



Request for Personnel Action (RPA) Business Workflow Automation System



AGENDA

- **System Overview**
- **System Preview**
- **Pilot and Implementation Plan**

OVERVIEW

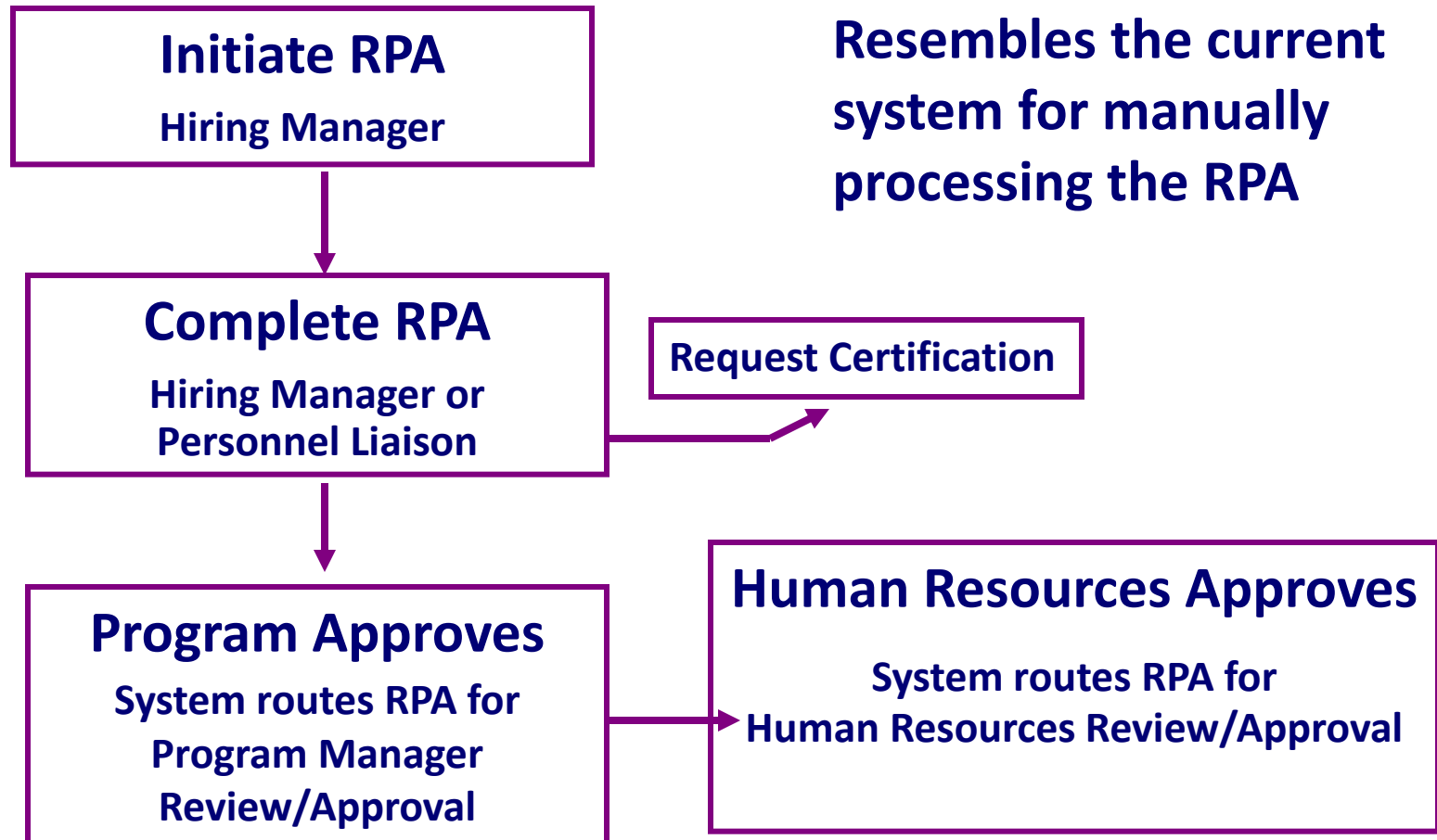
The RPA System replaces the existing manual process for RPAs and will automate the creation, routing, and approval of all DHCS RPAs through the following steps:

- RPA creation
- Appointing Program approval
- Human Resources Branch (HRB) review and approval
- Request for Certification
- Budget Office Approval (when required)

Additional System Features

- Tracks and records elapsed time for each step
- Sends email notice when user action is required
- Allows Word, PDF, and Excel attachments
- Provides reporting capabilities
- Provides security and access based on user's job function

Business Workflow Process



The RPA System is found on the DHCS Intranet . . .

http://dhcsintranet/Pages/default.aspx - Windows Internet Explorer

http://dhcsintranet/Pages/default.aspx

File Edit View Favorites Tools Help

http://dhcsintranet/Pages/default.aspx

Welcome Henson, Jerry (DHCS-ITSD) My Links My Site

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DHCS Intranet


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DHCS Intranet

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DHCS Business Workflow Automation System



- [Photos with River Cats Mascot, Dinger - July 7, 2010](#)
- [DHCS November 2010 Newsletter \(Archived Newsletters\)](#)
- [California Highway Patrol Safety Tips](#)
- [DHCS-CDPH Employee Wellness](#)
- [Document Collaboration Portal \(Sharing and Version Control\)](#)
- [State Employees Food Drive](#)
- [DHCS Strategic Plan and Implementation Plan](#)
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- [CDHS 29 Year Club \(PowerPoint Presentation\)](#)

Local intranet 100%

Start | Inbox - Microsoft Outlook | H:\Toastmasters\Speech | http://dhcsintranet/... | Microsoft PowerPoint - ... | 5:01 PM

. . . Using the Business Workflow Automation Portal

Default - Windows Internet Explorer

http://bwass.intra.dhcs.ca.gov/repproc/Pages/Default.aspx

File Edit View Favorites Tools Help

Search

GO

Department of Health Care Services Business WorkFlow Automation Portal

Workflow Desktop Reporting and Process Monitoring Historical Records

Current Applications

- Initiate RPA

Future Applications

- Future Application 2
- Future Application 3

BWAS > Reporting and Process Monitoring

REPORTS

There are currently no favorite links to display.

SEARCH CRITERIA

Search For: Status: Active

Search Forward Clear Filter and GOTO Page 1

ACTIVE PROCESS LIST

ID Number	Status	Description
ITS2512010	Active	RPA#: ITS2512010 this RPA will be filled prior to 6/30/2010. Position: 802-352-1587-xxx H.M.: Henson, Jerry (DHCS-ITSD) Proposed Appointee: Rakhi Malpani
ITS12682010	Active	RPA#: ITS12682010 CEP: [no entry] Position: [no entry] H.M.: Morison, Robert (DHCS-ITSD) Proposed Appointee:
ITS2282010	Active	RPA#: ITS2282010 Timothy Rathbone, redirect from CSCS to IMAS WAMU Position: 802-352-1312-xxx H.M.: Henson, Jerry (DHCS-ITSD) Proposed Appointee: Timothy Rathbone
ITS2292010		RPA#: ITS2292010 Charito Angeles, redirect from CSCS to IMAS WAMU Position: 802-352-1312-xxx

There are 5 key areas on the Request for Personnel Action Process screen

California Department of Health Care Services

Request for Personnel Action Process

Request for Personnel Action Audit Trail

RPA# (New) XXX17242010

Proposed Appointee:
-
Division/Office:
-
Current Position:
-
Proposed Position:

RPA Form

[Position Action](#)
[Employee Action](#)
[Various RPA Entries](#)
[RPA Notes](#)
[Print RPA](#)

Process Stages

[Initiate Process](#)

1. Action Type ☐ Merge ☐ Promotion in Place
 ☐ Fill ☐ Blanket
 ☐ Refill ☐ CEA/Exempt
 ☐ Reclass ☐ Reorganization
 ☐ Redirect

Special Instructions

RPA Comments

2. Current Position ☐ Conflict of Interest

Current Position Number - - - - Fraction:

Current Class Title

Tenure Time Base P/T Fraction

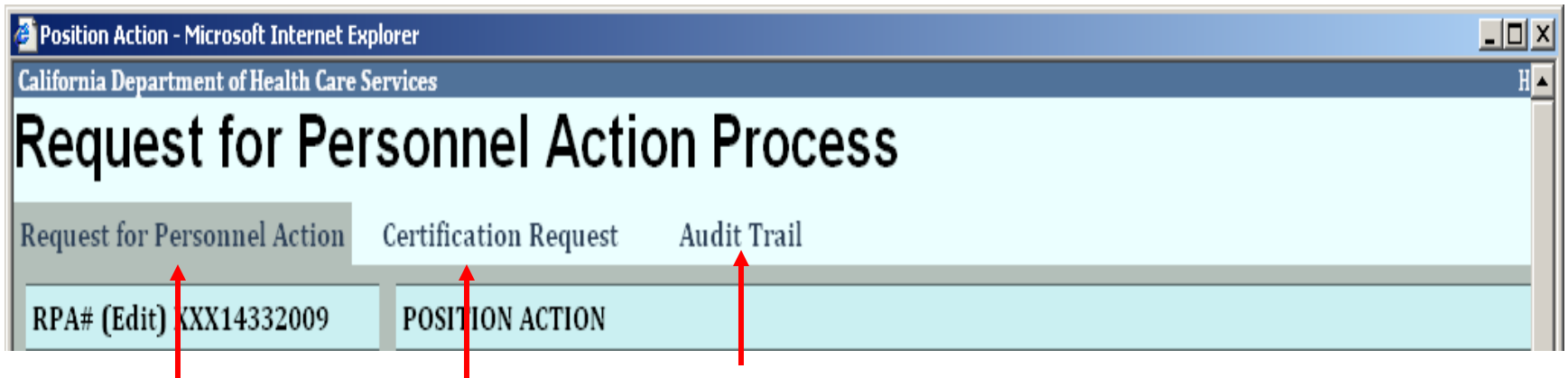
Get Position Information

5. Current Position Location

9. Index Code

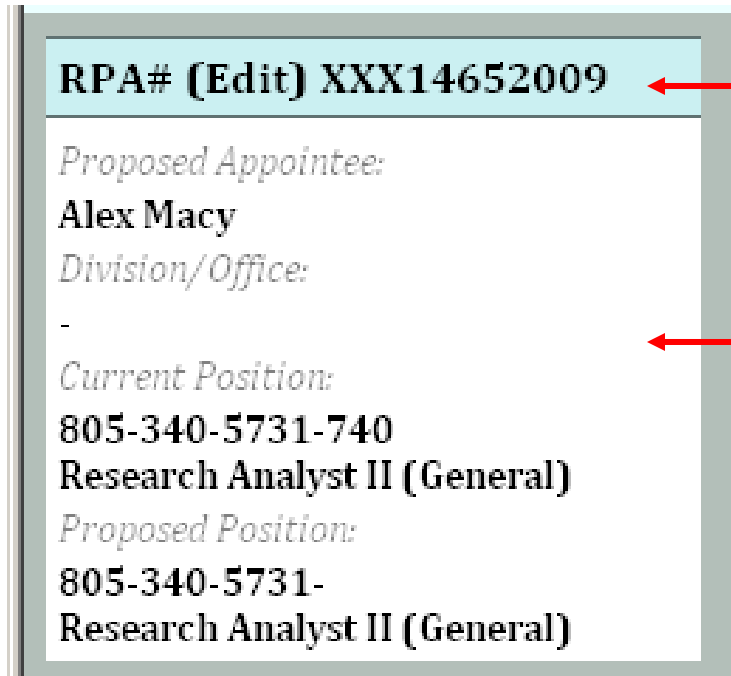
PCA Code

Functional Tabs



Functional Tabs, located at the top of the screen, are used to navigate between the major areas of the RPA Package.

RPA Summary



RPA# (Edit) XXX14652009

Proposed Appointee:
Alex Macy

Division/Office:
-

Current Position:
805-340-5731-740
Research Analyst II (General)

Proposed Position:
805-340-5731-
Research Analyst II (General)

The RPA Summary located in the upper left corner provides the RPA # and a quick summary of the RPA package.

RPA Form

RPA Form	
<u>Position Action</u>	←
<u>Employee Action</u>	←
<u>Various RPA Entries</u>	←
<u>RPA Notes +</u>	←
<u>Print RPA</u>	

Located directly below the RPA Summary, the RPA Form allows navigation between forms used to complete the RPA package.

Data Entry Areas

POSITION ACTION																				
1.	<table><tr><td>Action Type</td><td><input type="checkbox"/> Merge</td><td><input type="checkbox"/> Promotion in Place</td></tr><tr><td></td><td><input type="checkbox"/> Fill</td><td><input type="checkbox"/> Blanket</td></tr><tr><td></td><td><input type="checkbox"/> Refill</td><td><input type="checkbox"/> CEA/Exempt</td></tr><tr><td></td><td><input type="checkbox"/> Reclass</td><td><input type="checkbox"/> Reorganization</td></tr><tr><td></td><td><input type="checkbox"/> Redirect</td><td></td></tr></table> <table><tr><td>Special Instructions</td><td><input type="text"/></td></tr><tr><td>RPA Comments</td><td><input type="text"/></td></tr></table>	Action Type	<input type="checkbox"/> Merge	<input type="checkbox"/> Promotion in Place		<input type="checkbox"/> Fill	<input type="checkbox"/> Blanket		<input type="checkbox"/> Refill	<input type="checkbox"/> CEA/Exempt		<input type="checkbox"/> Reclass	<input type="checkbox"/> Reorganization		<input type="checkbox"/> Redirect		Special Instructions	<input type="text"/>	RPA Comments	<input type="text"/>
Action Type	<input type="checkbox"/> Merge	<input type="checkbox"/> Promotion in Place																		
	<input type="checkbox"/> Fill	<input type="checkbox"/> Blanket																		
	<input type="checkbox"/> Refill	<input type="checkbox"/> CEA/Exempt																		
	<input type="checkbox"/> Reclass	<input type="checkbox"/> Reorganization																		
	<input type="checkbox"/> Redirect																			
Special Instructions	<input type="text"/>																			
RPA Comments	<input type="text"/>																			
2.	<table><tr><td>Current Position</td><td><input type="checkbox"/> Conflict of Interest</td></tr><tr><td>Current Position Number</td><td><input type="text"/> - <input type="text"/> - <input type="text"/> - <input type="text"/> - Fraction: <input type="text"/></td></tr><tr><td>Current Class Title</td><td><input type="text"/></td></tr><tr><td>Tenure</td><td><input type="text"/> Time Base <input type="text"/> P/T Fraction <input type="text"/></td></tr></table> <div>Get Position Information</div>	Current Position	<input type="checkbox"/> Conflict of Interest	Current Position Number	<input type="text"/> - <input type="text"/> - <input type="text"/> - <input type="text"/> - Fraction: <input type="text"/>	Current Class Title	<input type="text"/>	Tenure	<input type="text"/> Time Base <input type="text"/> P/T Fraction <input type="text"/>											
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Current Class Title	<input type="text"/>																			
Tenure	<input type="text"/> Time Base <input type="text"/> P/T Fraction <input type="text"/>																			
5.	Current Position Location <input type="text"/>																			
9.	<table><tr><td>Index Code</td><td><input type="text"/></td></tr><tr><td>PCA Code</td><td><input type="text"/></td></tr></table>	Index Code	<input type="text"/>	PCA Code	<input type="text"/>															
Index Code	<input type="text"/>																			
PCA Code	<input type="text"/>																			
10.	Certification Request <input type="checkbox"/>																			
12.	<table><tr><td>Approver's Name</td><td>Approval Date</td></tr><tr><td>Hiring Manager Approver</td><td><input type="text"/></td></tr><tr><td>Division Chief Approver</td><td><input type="text"/></td></tr><tr><td>Personnel Analyst Approver</td><td><input type="text"/></td></tr><tr><td>Personnel Liaison Name</td><td><input type="text"/></td></tr><tr><td>Personnel Liaison Phone #</td><td><input type="text"/> - <input type="text"/> - <input type="text"/> Extension <input type="text"/></td></tr></table>	Approver's Name	Approval Date	Hiring Manager Approver	<input type="text"/>	Division Chief Approver	<input type="text"/>	Personnel Analyst Approver	<input type="text"/>	Personnel Liaison Name	<input type="text"/>	Personnel Liaison Phone #	<input type="text"/> - <input type="text"/> - <input type="text"/> Extension <input type="text"/>							
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Hiring Manager Approver	<input type="text"/>																			
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Personnel Analyst Approver	<input type="text"/>																			
Personnel Liaison Name	<input type="text"/>																			
Personnel Liaison Phone #	<input type="text"/> - <input type="text"/> - <input type="text"/> Extension <input type="text"/>																			
<div>Attachments Save my work Undo my changes Check my work</div> <div>Select an Action to Execute <input type="text"/> Execute</div>																				

The largest area of the screen is used to enter data. This is a basic view of the Position Action Form, which replaces the left side of the current RPA Form (DHCS 3001).

Employee Action

California Department of Health Care Services

Request for Personnel Action Process

Request for Personnel Action Audit Trail

RPA# (New) XXX17262010

Proposed Appointment:
-
Division/Office:
-
Current Position:
-
Proposed Position:
-
Not Found in DB

RPA Form

Position Action
Employee Action
Various RPA Entries
RPA Notes
Print RPA

Process Stages

Initiate Process

EMPLOYEE ACTION

1. Requested Effective Date: MM/DD/YYYY
Official Effective Date: MM/DD/YYYY

2. Proposed Appointee:
State Service: ☐ Current ☐ Prior ☐ None
DHCS Employee: ☐ New ☐ Current ☐ CLEAR
☐ Employment Application Exemption

3. Social Security Number: - -

4. Type of Appointment: ☐ List ☐ Transfer ☐ Reinstatement ☐ Time Base Change
☐ Other ☐ CLEAR

5. Tenure: ☐ Permanent
☐ Limited Term - Months:
☐ TAU - Months:
☐ TAU Actual Time Worked
☐ CLEAR

6. Time Base: ☐ Full Time
☐ Part Time - Fraction:
☐ Intermittent - Hours per month:
☐ CLEAR

7. Special Salary Requested: ☐ Hire Above Minimum - Salary: \$
☐ CEA and Exempt Empl. - Salary: \$
☐ Bilingual Hire - Language:
☐ Alternate Range Requested - Range:

8. Miscellaneous: ☐ Duties Approved
☐ Pre-Employment Medical Examination Required
☐ License or Certificate Required- Exp. Date:
☐ Salary Voluntary Reduction
☐ Time Base Reduction
☐ Typing Proficiency Required

9. Last/Highest A01 Appoint:
Class Code:
Appointment Date: MM/DD/YYYY
Class Title:
Alternate Range:
Verified By:
Tenure: ☐ Permanent ☐ Limited Term ☐ CLEAR
Time Base: ☐ Full Time
☐ Part Time - Fraction:
☐ CLEAR
Salary \$

Attachments Save My Work Undo my changes Check my Work

Select an Action to Execute Execute

Revision: 1.0.5.0


This is a basic view of the Employee Action screen, which replaces the right side of the current RPA Form (DHCS 3001).

The RPA is initiated by the Hiring Manager. . .

The screenshot shows the 'Business WorkFlow Automation Portal' for the 'Department of Health Care Services'. The user is logged in as 'Trainer Hire Manager'. The main navigation bar includes 'Workflow Desktop', 'Reporting and Process Monitoring', 'Historical Records', and 'System Management'. The left sidebar lists 'Current Applications' (Initiate RPA, Future Application 2, Future Application 3) and 'Future Applications'. The main content area shows 'BWAS UNIT TEST > Workflow Desktop' with a 'Selected Filter: Worklist' and 'Quick Search: All'. A red arrow points to 'Initiate RPA' in the sidebar.

Welcome Trainer Hire Manager | My Links | [My Site](#)

Search

Department of Health Care Services  **Business WorkFlow Automation Portal**

Workflow Desktop | **Reporting and Process Monitoring** | **Historical Records** | **System Management**

Current Applications

- »» [Initiate RPA](#)
- »» [Future Application 2](#)
- »» [Future Application 3](#)

Future Applications

BWAS UNIT TEST > Workflow Desktop

Selected Filter: **Quick Search:**

You either have no outstanding Tasks or none of them meet the current 'Quick Search' criteria

... Using the Worklist - Hiring Manager and Personnel Liaison collaborate to complete the RPA Package

The screenshot displays the 'Workflow Desktop' interface for 'BWAS UNIT TEST'. The top navigation bar includes 'Workflow Desktop', 'Reporting and Process Monitoring', 'Historical Records', and 'System Management'. The left sidebar lists 'Current Applications' (Initiate RPA) and 'Future Applications' (Future Application 2, Future Application 3). The main content area shows a 'Worklist' with a 'Selected Filter' of 'Worklist' and a 'Quick Search' of 'All'. A red arrow points to the 'Initiate RPA' application in the sidebar. The worklist table has two columns: 'Description' and 'Current Activity'. The first row shows 'RPA#: XXX17272010' with a description 'Reclass and Fill with Jill Smith from list' and a current activity 'Personnel Liaison Review'. The second row shows 'Position: 808-102-5142-xxx' and 'H.M.: Trainer Hire Manager'. Navigation links at the bottom include '< Previous | Page 1 | Next >'. A red arrow points to the 'Initiate RPA' application in the sidebar.

Description	Current Activity
RPA#: XXX17272010 Reclass and Fill with Jill Smith from list	Personnel Liaison Review
Position: 808-102-5142-xxx H.M.: Trainer Hire Manager	

Initiating an RPA is as simple as selecting an Action Type . . .

California Department of Health Care Services

Request for Personnel Action Process

Request for Personnel Action Audit Trail

RPA# (New) XXX17292010

Proposed Appointee:
-
Division/Office:
-
Current Position:
-
Proposed Position:

RPA Form

[Position Action](#)
[Employee Action](#)
[Various RPA Entries](#)
[RPA Notes](#)
[Print RPA](#)

Process Stages

Initiate Process

POSITION ACTION

1. **Action Type** ☐ Merge ☐ Promotion in Place
 ☐ Fill ☐ Blanket
 ☐ Refill ☐ CEA/Exempt
 ☐ Reclass ☐ Reorganization
 ☐ Redirect

Special Instructions

RPA Comments

2. **Current Position** ☐ Conflict of Interest

Current Position Number - - - - Fraction:

Current Class Title

Tenure Time Base P/T Fraction

Get Position Information

5. **Current Position Location**

9. **Index Code**

PCA Code

... And routing the RPA to the Personnel Liaison

process

Current Class Title

Tenure Time Base P/T Fraction

Get Position Information

5. Current Position Location

9. Index Code
PCA Code

10. Certification Request ☐

12.

Approvers	Name	Approval Date
Hiring Manager Approver	<input type="text"/>	<input type="text"/>
Division Chief Approver	<input type="text"/>	<input type="text"/>
Personnel Analyst Approver	<input type="text"/>	<input type="text"/>

Personnel Liaison Name

Personnel Liaison Phone # - - Extension

Attachments **Save my work** **Undo my changes** **Check my work**

Select an Action to Execute **Execute**

5.0

Audit Trail

California Department of Health Care Services

Request for Personnel Action Process

Request for Personnel Action Audit Trail

RPA# (New) XXX17292010

Proposed Appointee:
-
Division/Office:
-
Current Position:
-
Proposed Position:

RPA Form

[Position Action](#)
[Employee Action](#)
[Various RPA Entries](#)
[RPA Notes](#)
[Print RPA](#)

Process Stages

Initiate Process

POSITION ACTION

1. Action Type ☐ Merge ☐ Promotion in Place
☐ Fill ☐ Blanket
☐ Refill ☐ CEA/Exempt
☐ Reclass ☐ Reorganization
☐ Redirect

Special Instructions

RPA Comments

2. Current Position ☐ Conflict of Interest

Current Position Number - - - - Fraction:

Current Class Title

Tenure Time Base P/T Fraction

5. Current Position Location

9. Index Code

PCA Code

The Audit Trail is a valuable system feature . . .

... Showing all RPA activities and the elapsed time for each.

AUDIT TRAIL

Audit Trail for RPA: XXX14652009

Underlined headings may be clicked on to sort the column, click again to re-sort in the opposite order

<u>Activity Name</u>	<u>Status</u>	<u>Start Date</u>	<u>Finish Date</u>	<u>Approver</u>	<u>Approver Action</u>
Hiring Manager Review	Completed	11/12/2009 8:38:19 AM	11/12/2009 8:57:27 AM	K2:DHSINTRA\zztestwftSdb2	Send to PL
Personnel Liaison Review	Completed	11/12/2009 8:57:27 AM	11/12/2009 9:00:13 AM	K2:DHSINTRA\zztestwftPLitsd	Return to HM
Hiring Manager Review	Completed	11/12/2009 9:00:13 AM	11/12/2009 9:04:45 AM	K2:DHSINTRA\zztestwftSdb2	Send to PL
Personnel Liaison Review	Completed	11/12/2009 9:04:45 AM	11/12/2009 9:07:21 AM	K2:DHSINTRA\zztestwftPLitsd	Approve
Hiring Manager Approval	Completed	11/12/2009 9:07:22 AM	11/12/2009 9:09:40 AM	K2:DHSINTRA\zztestwftSdb2	Approve
Program Management Approval	Active	11/12/2009 9:09:41 AM	11/12/2009 9:09:41 AM		

Revision: 0.0.0.87

Windows taskbar: Start, Internet Explorer, Outlook, Word, PowerPoint, I., I., D., D., D., H., H., H., H., H., H., H., A., D., ?

Notification: Bissell-Benabides, Kathleen (DHCS-UMD-...)
Read: RPA Pilot Testing Orientation


The Work List shows all RPA packages waiting for your action . . .

The screenshot displays the 'Workflow Desktop' tab of the 'BWAS UNIT TEST' application. The left sidebar contains a navigation menu with 'Current Applications' (Initiate RPA) and 'Future Applications' (Future Application 2, Future Application 3). The main content area shows a 'Worklist' with a table of RPA packages. The table has two columns: 'Description' and 'Current Activity'. A red arrow points to the first row of the table, which contains the following information:

Description	Current Activity
RPA#: XXX17272010 Reclass and Fill with Jill Smith from list Position: 808-102-5142-xxx H.M.: Trainer Hire Manager	Personnel Liaison Review

Below the table, there are navigation links: '< Previous | Page 1 | Next >'. The top of the interface includes tabs for 'Workflow Desktop', 'Reporting and Process Monitoring', 'Historical Records', and 'System Management'. The 'Selected Filter' is set to 'Worklist' and the 'Quick Search' is set to 'All'.

The Watch List shows the RPA packages you can monitor and/or track . . .

Department of Health Care Services  Business WorkFlow Automation Portal

Workflow Desktop | Reporting and Process Monitoring | Historical Records | System Management

BWAS UNIT TEST > Workflow Desktop

Current Applications
» Initiate RPA

Future Applications
» Future Application 2
» Future Application 3

Selected Filter: Watchlist Quick Search: All

Description	Current Activity
XXX17122010	Process Watch
XXX17132010	Process Watch
RPA#: XXX17142010 Position: 805-140-1470-057 H.M.: Trainer Hire Manager New position	Process Watch
RPA#: XXX17152010 Position: 808-101-4800-xxx H.M.: Trainer Hire Manager Refill and redirect a position with applicant selected from a list	Process Watch
RPA#: XXX17182010 Position: 808-435-5393-xxx H.M.: Trainer Hire Manager Reclass; Commitment Cert; FT Position Filled with 1/2 Employee	Process Watch
RPA#: XXX17232010 Position: 802-340-1312-001 H.M.: Trainer Hire Manager Refill Vacant Position with cert appointment - 1/2 time base employee in full time position	Process Watch
RPA#: XXX17232010 Position: 802-340-1312-001 H.M.: Trainer Hire Manager Refill Vacant Position with cert appointment - 1/2 time base employee in full time position	Process Watch
RPA#: XXX17272010 Position: 808-102-5142-xxx H.M.: Trainer Hire Manager Reclass and Fill with Jill Smith from list	Process Watch

« Previous | Page 5 | Next »



QUESTIONS?



THANK YOU!